

UNITED STATES DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
REHABILITATION SERVICES ADMINISTRATION  
WASHINGTON, DC 20202-2741

POLICY DIRECTIVE

RSA-PD-99-02

RSM-0501

DATE: 12/10/98

ADDRESSEES: STATE VOCATIONAL REHABILITATION AGENCIES (GENERAL)  
STATE VOCATIONAL REHABILITATION AGENCIES (BLIND)  
STATEWIDE INDEPENDENT LIVING COUNCILS  
CENTERS FOR INDEPENDENT LIVING  
CLIENT ASSISTANCE PROGRAMS  
RSA SENIOR MANAGEMENT TEAM

SUBJECT: Section 704 Annual Performance Report

POLICY

STATEMENT: This transmits the Section (§)704 Annual Performance Report consisting of two parts and instructions for the completion and submittal of the Reports for the State Independent Living Services (SILS), and Centers for Independent Living (CIL) programs. OMB approval number for this report form is 1820-0606.

The purpose of this report is to:

- o Serve as a performance measuring instrument of independent living (IL) programs, both quantitatively and qualitatively;
- o Determine the training and technical assistance needs of Statewide Independent Living Councils (SILCs) and Centers for Independent Living (CILs) as required by section 721(b)(3) of the Act;
- o Determine CIL compliance with the standards, assurances, and indicators of compliance with the standards in section 725 of the Act and 34 CFR Part 366;
- o Collect information necessary for issuance of continuation awards for qualified CILs funded under the CIL program;
- o Collect the data required by sections 13, 706, 721, and 725 of the Rehabilitation Act of 1973, as amended (Act) for the State

- o Independent Living Services (SILS) program and the Centers for Independent Living (CIL) programs;
- o Serve as the basis for on-site reviews of the Chapter 1, Title VII of the Act program grantees; and
- o Obtain a report from Statewide Independent Living Councils and Designated State Units regarding their activities in the State plan for independent living development, administration, monitoring, and evaluation, including an assessment of consumer satisfaction with the IL programs in the States.

Several significant changes have been made in the Report from the prior version. These changes include: 1. Numerous small wording changes designed to increase the readability of the form; 2. Additions: a question to measure how many individuals were assisted in leaving nursing homes and other institutions, a question to measure how many individuals received services that prevented them having to move into a nursing home or other institution, a consumer satisfaction reporting requirement, a requirement for CILs to report how many individuals received services, by county; 3. Deletions: reporting the length of time a consumer service record is open, reporting consumer living arrangements, and the question related to funding sources for personal assistance. 4. There are two OMB approved versions of the 704 Report, Part II, one with Statutory and regulatory citations and another without citations. The version without citations was created in response to requests from several CILs.

#### CITATIONS

IN LAW: Title VII of the Rehabilitation Act of 1973, as amended, Sections 13, 704(m)(4)(D), 705(c)(5), 706(d), 722, 723, 725(c)(8), and 725(c)(13)

#### CITATIONS IN

REGULATIONS: 34 CFR Parts 364, 365, and 366

#### EFFECTIVE

DATE: Upon Issuance

#### EXPIRATION

DATE: November 30, 1999

INQUIRIES: RSA Regional Commissioners

Fred Schroeder (signed)  
 Frederic K. Schroeder, Ph.D.  
 Commissioner  
 Rehabilitation Services Administration

# **UNITED STATES DEPARTMENT OF EDUCATION**

## **Office of Special Education and Rehabilitative Services**

### **REHABILITATION SERVICES ADMINISTRATION**

#### **SECTION 704 PERFORMANCE REPORT**

##### **INDEPENDENT LIVING PROGRAMS**

###### **CHAPTER 1**

###### **TITLE VII**

###### **PART II**

###### **Instructions and Pre-Print**

###### **Non-Cited Version**

###### **Centers for Independent Living**

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. The valid OMB control number for this information collection is 1820-0606. The time required to complete this information collection is estimated to average 38 hrs per response, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: U.S. Department of Education, Washington, D.C. 20202-4651. If you have comments or concerns regarding the status of your individual submission of this form, write directly to: Merri Pearson, Independent Living Program, Independent Living Branch, U.S. Department of Education, MES Bldg., Room 3316, 330 C St. S.W., Washington, D.C. 20202-2741

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**UNITED STATES DEPARTMENT OF EDUCATION**  
**Office of Special Education and Rehabilitative Services**  
**Rehabilitation Services Administration**  
**Washington, DC 20202-2741**

**INSTRUCTIONS for COMPLETION and SUBMISSION**  
**of the 704 ANNUAL PERFORMANCE REPORT**  
**PURPOSE OF THE REPORT**

The purpose of this report is to:

- (A) Serve as a performance activity measuring instrument of independent living (IL) programs including both quantitative and qualitative information;
- (B) Determine the training and technical assistance needs of Centers for Independent Living (CILs) as required by section 721(b)(3) of the Rehabilitation Act of 1973, as amended (Act);
- (C) Determine CIL compliance with the standards, assurances, and indicators of compliance with the standards in Section 725 of the Act and 34 of the Code of Federal Regulations (CFR) Part 366;
- (D) Collect information necessary for issuance of continuation awards for qualified CILs funded under the CIL program;
- (E) Collect the data required by Section 13, 706, 721, and 725 of the Act for the State Independent Living Services (SILS) and the Centers for Independent Living (CIL) programs; and
- (F) Serve as the basis for on-site reviews of the Chapter 1, Title VII of the Act grantees.

The report is structured to:

- (A) Establish a uniform reporting system to compile an accurate national report on independent living;
- (B) Enable each State to have information on **all** funds expended for IL in the State for what the funds paid, who was served, what services were provided, and for RSA to be able to compare State and CIL performance with other States and other CILs.

## **GLOSSARY OF TERMS**

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Act	The Rehabilitation Act of 1973, as amended.
CIL	A “Center for Independent Living” meeting the definition in Section 702 of the Act, and the standards in Section 725 of the Act.
CIL Program	The “Centers for Independent Living program” funded under part C, Chapter 1 (Ch. 1) of Title VII of the Act (part C).
Consumer	Any individual with a significant disability who is eligible for IL services under 34 CFR 364.40(a) and is currently receiving or has been provided with any IL service(s) under the program, other than information and referral.
Core Services	IL services defined in Section 7(29) of the act; including: information and referral; IL skills training; peer counseling (including cross-disability peer counseling); and, individual and systems advocacy.
CSR	A “Consumer Service Record” maintained for an eligible consumer receiving IL services and meeting the requirements of 34 CFR 364.53. Where IL services are provided to the parent or guardian of a consumer, the CSR is established for the consumer and the services provided are reflected in that CSR.
DSU	The “Designated State Unit, or Units” identified under Section 101(a)(1) of the Act, to jointly with the Statewide Independent Living Council (SILC) develop and sign the State plan for Ch. 1 of Title VII under Section 704 of the Act. The term includes a State agency solely designated under State law to provide IL services to individuals who are blind. In such State, the State agency for the blind may administer the provisions in the attachments to the State plan providing for services to individuals who are blind. In a “723” State”, the DSU receiving, accounting for, and disbursing the funds for the CIL program is always the general agency.
Earmarked Funds	Funds appropriated by the State and expressly or clearly identified as State expenditures in the relevant fiscal year for the sole purpose of funding the general operation of CILs meeting the requirements of Sections 702 and 725 of the Act.
Section 722 State	A State where RSA issues grants under Part C directly to eligible agencies (CILs).
Section 723 State	A State where the DSU issues grants or assistance contracts under part C to eligible entities for the planning, establishment, and operation of CILs.
IL	“Independent Living”

ILP	An “Independent Living Plan” for the provision of IL services mutually agreed upon by an appropriate staff member of a service provider and an individual with significant disabilities.
Minority	Alaskan Natives, American Indians, Asian Americans, Black (African Groups) Americans, Hispanic Americans, Native Hawaiians, and Pacific Islanders.
Reporting Year	The most recent Federal fiscal project year completed - October 1 to September 30.
RSA	The “Rehabilitation Services Administration” in the United States Department of Education, Office of Special Education and Rehabilitative Services.
Service Provider	<ul style="list-style-type: none"> <li>(i) A DSU that directly provides IL services to consumers; or</li> <li>(ii) A CIL; or</li> <li>(iii) An entity that: <ul style="list-style-type: none"> <li>(A) provides IL services under a grant or contract; and</li> <li>(B) is delegated responsibility for the determination of eligibility for IL services.</li> </ul> </li> </ul>
SILC	The “Statewide Independent Living Council” established in each State as required by Sections 704 and 705 of the Act.
SILS	The “State Independent Living Services program” funded under part B, Chapter 1 of Title VII of the Act.
SPIL	The “State Plan for Independent Living” which governs and provides the context for State IL Services and Centers for Independent Living programs and describes the services to be provided under the IL Services for Older Individuals Who Are Blind program.
STATE	Wherever the term “State” is used, it refers to the State in its sovereign sense. For purposes of Title VII, the DSU(s) and the SILC jointly represent the State, except where otherwise noted.



## **CONTENTS OF THE REPORT**

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The annual 704 report consists of two parts. Part I contains the reports of the SILC's and DSU's activities for the reporting year. It also contains data from consumer service records where those records are maintained outside of a CIL reporting in Part II. Part II contains a CIL's self-evaluation of compliance with the requirements of Section 725 of the Act, a comparison of the CIL's activities during the reporting year with its work plan for that year, and data from consumer service records maintained by the CIL. It also contains the CIL's work plan and any necessary budget amendments for the next fiscal year.

### **704 REPORT, PART II contains:**

- (A) Subpart IIA - Self Evaluation: a measure of the extent to which a CIL is in compliance with the standards in section 725(b) of the Act and the indicators of minimum compliance with the standards in 34 CFR Part 366, Subpart G;
- (B) Subpart IIB - Narrative: a comparison of the activities of the CIL within the reporting year with the proposed activities of the CIL in the work plan. This shall include:
  - (1) A comparison of activities and accomplishments during the reporting year with the goals and activities included in the reporting year's work plan;
  - (2) A comparison between the reporting year with the previous year's work plan;
  - (3) Descriptions of significant activities or practices not reported in previous years, which could be replicated and used by other States and CILs;
  - (4) A report of which counties are served by the CIL and how many consumers received services in each county; and
  - (5) Descriptions of substantial problems or difficulties, particularly problems that may affect compliance, alternative resolutions explored, and which ones worked (why did they work?).
- (C) Subpart IIC - Program Planning objectives: a report on compliance with the assurance that a CIL will establish annual and 3-year work plans and a copy of the CIL's work plan for the next fiscal year;
- (D) Subpart IID - Sources and Amounts of Funding for the Operation of the CIL: a report on resources received and expended by a CIL during the reporting year;
- (E) Subpart IIE - Next Fiscal Year Budget Information: submittal of budgets for the remaining years of the grant where the budgets have not been previously negotiated, or a revised budget where appropriate;

- (F) Subpart IIF - Consumer Demographics: provides information from CSRs controlled by the CIL on the numbers and types of consumers receiving IL services, regardless of the source of funding for a particular service; and
- (G) Subpart IIG - Types and Amounts of Services Provided: a report of how much, the type, and overall community work and the results of such work. This should reflect the community and individual (Subpart IIGII) IL services provided by the CIL. Information on individual services is reported only from CSRs controlled by the CIL, regardless of the source of funding for a particular service.

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## **WHO MUST COMPLETE THE REPORT AND WHERE MUST IT BE SUBMITTED?**

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### **Section 722 State:**

- (A) The part C funded CILs will submit two copies of the Part II report to the RSA regional office and one copy to the SILC. If the CIL is receiving both part B and part C funds, a copy of the report should also be submitted to the DSU.
- (B) CILs funded solely with part B or State funds will submit their Part II reports to the DSU and the SILC by the date established by the DSU. The DSU will then transmit the CIL reports to RSA with their Part I report.

### **Section 723 State:**

CILs will file their Part II reports with the DSU and the SILC. The State will aggregate the data and summarize other information in the Part II reports with their Part I report and attach the incoming reports from the CILs for reference, including the State's Technical Assistance and Training Needs Survey. The aggregate Part I report will be forwarded to RSA (one copy to the regional office, and one copy to RSA central office).

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*A list of RSA regional and central office contacts, addresses, telephone numbers and electronic contact user IDs, is included at the end of these instructions.*

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## **WHEN MUST THE REPORT BE SUBMITTED TO RSA?**

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### **Section 722 States:**

Part II reports from part C funded CILs are due to RSA regional offices Feb. 12, 1999.

### **Section 723 States:**

The information from the Part II reports is included in the aggregate Part I report, which is due to RSA February 26, 1999.

## **RECORD RETENTION**

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The information provided in this report by Federal grantees is subject to confirmation at an on-site compliance review; therefore, financial records, statistical records, and all supporting documents and other records pertinent to the grant award, adequate to document the accuracy of the information and statements in the 704 Annual Performance Report, must be kept for five years.

## INSTRUCTIONS FOR COMPLETING THE 704 ANNUAL PERFORMANCE REPORT

### **SELF-EVALUATION (Part II, Subpart IIA & IIB)**

The purpose of the self evaluation is to assist the CIL to assess the CIL's compliance with the standards in Section 725 (b) and the indicators of minimum compliance with the standards in 34 CFR Part 366, Subpart G; and the assurances in Section 725 (c) and 34 CFR Part 366, Subpart F.

The standards, indicators, and assurances are requirements reflecting essential elements that a CIL must meet to comply with the statutory definition of a CIL and to be eligible for continuation funding.

This subpart and the instructions for the narrative section (Subpart IIB) provide guidance against which a CIL should review its activities to determine whether or not it may have a problem complying with the standards in the event of an on-site compliance review under Section 706(c) or 723(g) and (h) of the Act. If the CIL does identify particular compliance problems, it should address them in the manner suggested below.

*If a CIL determines through its self evaluation that it may have a problem meeting one of the standards or an assurance, it should note in the Part II report either:*

- (A) *What action has been taken since the end of the reporting year to correct the deficiency (Attachment II-B); or*
- (B) *Include in next year's work plan, a description of the corrective action the CIL proposes to take to correct the deficiency (Attachment II-C(a)).*

### **Staffing**      Part II, Subpart IIAI(a)(1)

- (1) "FTE" means one person working full-time equivalent of one year (approx. 2,080 hours). Part-time employees and employees who worked for any fraction of the year are counted as a fraction of an FTE to the nearest tenth.
- (2) To compute FTE for purposes of the 704 report, determine the number of hours (excluding overtime) for which employees were actually paid during the last six months of the reporting year. Multiply the hours worked by two and then divide the result by 2080 = FTE.
- (3) Categories of positions are:
  - (i) Decision making - e.g., executive director, supervisors, and any other policy position;
  - (ii) Staff - e.g., counselors, teachers, trainers, and other staff not included in the definition above (3)(i).

## **ATTACHMENT II -B CIL NARRATIVE (REPORTING YEAR FY 1998)**

\*Please do not report information in this section that is included elsewhere in the report.

In the following order, please describe or discuss:

- (A) Activities and accomplishments during the reporting year. Compare the reporting year goals and activities to intended activities and accomplishments. Briefly discuss how the activities compare and refer to the section(s) of the self-evaluation (Part II, Section IIA Indicators) with which the activities and accomplishments demonstrate compliance. Address:
- (1) Advocacy efforts, including but not limited to:
    - . Community and systems efforts;
    - . Technical assistance plans;
    - . Communication, coordination, and cooperation plans; and
    - Affirmative action plans.
  - (2) Outreach efforts. Describe the CIL's outreach activities to consumers who are members of populations of individuals with significant disabilities, including minorities, who are unserved or under served. As part of your identification of unserved and underserved areas and populations for outreach discuss: 1. the CIL's percentage of minorities receiving services when considered with their population percentage in the service area and 2. which counties were served by the CIL and how many individuals with significant disabilities received services in each county.
  - (3) Community and individual IL service needs. In addition to your report on work plan activities in this area, provide a brief summary of the type of opportunities provided consumers to express satisfaction including the number of individuals assessed and the number of respondents. Also, indicate any planned needs assessment of individuals with significant disabilities living in the service area. Please describe the type of assessment approach, e.g., focus group, written survey, telephone survey, public meeting, etc.
  - (4) Resource development. If the information is available, please report the percentage and dollar amount of the CIL's total funding represented by resources received from sources other than Title VII of the Act. Please note any exemplary replicable methods of resource development.
  - (5) Training. Please provide a brief report on staff and governing board training activities during the reporting year.
- (B) Significant activities not accounted for elsewhere in the report. This may include things such as brief summaries of innovative activities or practices not reported in previous years, which could be replicated and used by other States and CILs.
- (C) Descriptions of substantial problems or difficulties. This section should describe challenges faced by the center, the types of resolutions attempted, and information about which resolution methods worked. If a corrective action plan is included in next year's work plan, please just cross-reference it here. There is no need to restate such information.

## **ATTACHMENT II - C(a) - NEXT YEAR'S WORK PLAN**

This attachment contains information about the CIL's work plan for the next Federal fiscal year (FY 2000). The plan should be specific and measurable so that, at the end of the reporting year, the CIL can compare its achievements against its projected goals and the indicators in Part II, Subpart IIA. This work plan should be arranged around particular goals and the related activities that will lead to the accomplishment of those goals. In addition, if a corrective action plan is included to correct a self-identified compliance problem, it should be specifically cross-referenced to the related standard or indicator in Part II Section IIA.

The work plan should include goals and activities in the following areas:

- (A) Advocacy Efforts This section describes how the CIL will achieve individual and systems advocacy. This may include:
  - (1) Community advocacy plan and related activities;
  - (2) Technical assistance plan and related activities;
  - (3) Collaboration plan that indicates efforts for communication, coordination, and cooperation with other agencies and groups; and
  - (4) Affirmative action plan or policy statement.
- (B) Outreach Efforts This section describes the CIL's plans for outreach to consumers who are members of populations of individuals with significant disabilities, including minorities, who are unserved or under served. If the CIL conducted a needs assessment or used information from a needs assessment completed by another entity, RSA recommends that this information be included in Part II, Attachment II-B(4). In addition, needs assessment information may be beneficial to the SILC and CIL governing board, and as such, RSA further recommends that this information be shared with both entities.
- (C) Community and Individual IL Services This section identifies the community and IL services the CIL anticipates providing during the next Federal fiscal year.
- (D) Consumer Satisfaction Assurances This section ensures that CILs provide opportunities for consumers to express their satisfaction with the CIL's services and policies in facilitating their achievement of IL goals. In addressing this requirement CILs:
  - (1) Should afford consumers an opportunity to anonymously express satisfaction or dissatisfaction with the effectiveness of the CIL's services and policies in facilitating consumers' achievement of IL goals;
  - (2) May use various approaches such as town meetings, focus groups, written and telephone surveys;
  - (3) Must report the results to the CIL's governing board, SILC, and include a brief summary of such results in Part II, Attachment II-B.

- (E) Response to Needs This section is included if there are needs identified in the work plan to respond to consumer satisfaction assurances and other community needs assessment information. Such needs may include:
- (1) Making adjustments in the CIL's resource allocations to meet consumer needs;
  - (2) Advocacy efforts intended to expand the options available to consumers through the creation of new programs;
  - (3) A corrective action plan addressing specific deficiencies in the CIL's activities or operation.
- (F) Resource Development Plans This section describes the CIL's goals and activities for obtaining and increasing funding (including "in-kind") from sources other than Title VII of the Act. RSA encourages CILs to set goals to increase funding received by the center from sources other than Title VII of the Act by setting a percentage target increase related to the CIL's anticipated funding from all sources for the next year.
- (G) Training Efforts This section describes plans for training the CIL governing board, employees, volunteers, and consumers. Training areas may include staff development, IL philosophy, ADA, self-advocacy and personal power; and, moving people out of nursing homes.

#### **ATTACHMENT II - C(b) - CIL TRAINING AND TECHNICAL ASSISTANCE NEEDS**

This attachment describes in priority order center training and technical assistance needs for the next fiscal year. The needs identified will be used to design CIL training opportunities offered through the training and technical assistance cooperative agreement.

#### **ATTACHMENT II - D - SOURCES AND AMOUNTS OF RESOURCES**

This section describes the amount and sources of funds obligated during the reporting year by the CIL.

#### **ATTACHMENT II - E - ED FORM NO. 524 - BUDGET PROPOSAL**

A CIL that has negotiated a budget for each year of its grant award is not required to submit this form unless certain changes are anticipated in the budget for the upcoming year. These changes, which require RSA approval, are specified in 34 CFR 74.25 and 80.30 of EDGAR. The following is a list of instructions for completing ED Form No. 524:

## **GENERAL INSTRUCTIONS**

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This form is used to apply to individual U. S. Department of Education discretionary grant programs. Unless directed otherwise, provide the same budget information for each year of the multi-year funding request. Pay attention to applicable specific instructions, if attached.

### **Section A - Budget Summary**

#### **U. S. Department of Education Funds**

All applicants must complete Section A and provide a breakdown by the applicable budget categories shown in lines 1-11.

Lines 1-11, columns (a)-(e):

For each project year for which funding is requested, show the total amount requested for each applicable budget category.

Lines 1-11, column (f):

Show the multi-year total for each budget category. If funding is requested for only one project year, leave this column blank.

Line 12, column (a)-(e):

Show the total budget request for each project year for which funding is requested.

Line 12, column (f):

Show the total amount requested for all project years. If funding is requested for only one year, leave this space blank.

#### **Section B - Budget Summary Non-Federal Funds**

If you are required to provide or volunteer to provide matching funds or other non-Federal resources to the project, these should be shown for each applicable budget category on lines 1-11 of Section B.

Lines 1-11, columns (a)-(e):

For each budget year for which matching funds or other contributions are provided, show the total contribution for each applicable budget category.

Lines 1-11, column (f):

Show the multi-year total for each budget category. If non-Federal contributions are provided for only one year, leave this column blank.

Line 12, columns (a)-(e):

Show the total matching contribution for each project year.



Line 12, column (f):

Show the total amount to be contributed for all years of the multi-year project. If non-Federal contributions are provided for only one year, leave this space blank.

### **Section C - Other Budget Information**

**Pay attention to applicable program specific instructions, if attached**

1. Provide an itemized budget breakdown, by project year, for each budget category listed in Sections A and B.
2. If applicable to this program, enter the type of indirect rate (provisional, predetermined, final, or fixed) that will be in effect during the funding period. In addition, enter the estimated amount of the base to which the rate is applied, and the total indirect expense.
3. If applicable to this program, provide the rate and base on which fringe benefits are calculated.
4. Provide other explanations or comments you deem necessary.

## **NUMBERS AND TYPES OF INDIVIDUALS WITH SIGNIFICANT DISABILITIES RECEIVING SERVICES (Subpart IIF)**

- I**     Active Consumer Service Records    This is a count of individuals who were determined eligible for IL services during any part of the year, and for whom a CSR was initiated.
- (A)    Enter the number of active CSRs carried over from September 30 of the preceding year;
- (B)    Enter the number of new CSRs initiated during the year; and
- (C)    Enter the total number of consumers served during the year.
- II**    Inactive Consumers at Year End    This is a count of consumer records that have been purged from the active CSR file because the individual has moved, stated that he or she had no further interest in the program, died, or achieved all goals set, or for any other reason is no longer an active consumer of the CIL.
- III**   Active Consumers at Year End    This is a count of the total number of consumers remaining active on September 30 of the reporting year.

**For the remaining sections of this subpart, RSA intends that the demographic information include all consumers served during the year.**

- IV**    Consumer Plans and Waivers                      Please indicate the number of individuals who signed a waiver and the number of individuals who developed an independent living plan.
- V**     Consumer Achievements                              Report the total number of goals set by consumers and the number of goals achieved by consumers during the reporting year. Please classify goals in the following categories:
- (A)    Self-Care                      -                      Goals to improve/maintain a consumer's autonomy with respect to activities of daily living such as personal grooming and cleaning, toileting, meal preparation, shopping, eating, etc...
- (B)    Communication -                      Goals involving either improvement in the consumer's ability to understand and acknowledge communication by others (receptive skills), or improvement in one's ability to communicate with others (receptive skills).
- (C)    Mobility -                              Goals to improve a consumer's access to their life space, environment, and community. This may occur by improving the individual's own ability to move or transport themselves, or by others.

- (D) Residential - Goals that provide for a change in living situations with increased autonomy for the consumer. This may include movement from a nursing home to another more independent residential situation.
  - (E) Educational - Goals of an academic or training nature that are expected to improve the consumer's basic knowledge or increase their ability to perform certain skills deemed to increase their independence consistent with IL philosophy.
  - (F) Vocational - IL goals related to obtaining, maintaining, or advancing in employment.
  - (G) Other - IL goals not included in the above categories.
- VI** Age - Enter the number of consumers in each age category at the end of the reporting years. For CSRs put in inactive status during the year, use the consumer's age reached during the reporting year.
- VII** Gender - Enter the number of males and females served during the fiscal year.
- VIII** Race/Ethnicity - Enter a count of individuals by race or ethnicity. Information should be solicited on a voluntary basis. If unavailable, consumers should be included in the group to which they appear to belong. If unknown, do not enter a count. For persons who are of mixed racial origin, use the category which reflects the individual's choice. The racial categories are:
- (A) White - (non-Hispanic) - A person having origins in any of the original peoples of Europe, North Africa, or the Middle East.
  - (B) Black (non-Hispanic) - A person having origins in any of the black racial groups of Africa.
  - (C) American Indian or Alaskan Native (including Native Hawaiians) - A person having origins in any of the original peoples of North America or Hawaii, and who maintains cultural identification through affiliation or community identification.
  - (D) Asian or Pacific Islander - A person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands, and Samoa.
  - (E) Hispanic - A person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin.

**IX**     Disability - Enter a count of individuals with a significant cognitive, mental, physical, hearing, vision, or multiple disability.

**X**     Community-Based Living -

(A)     Indicate the number of consumers who have received IL services in the reporting year who successfully relocated from nursing homes or other institutions to community-based living arrangements. Community-based living arrangements include privately owned housing, apartments, self-directed assisted living, or self-directed with family/friends.

(B)     Indicate the number of consumers for whom IL services prevented the necessity of entering nursing homes or other institutions. These individuals were therefore continued living in a community-based living arrangements.

**TYPES OF SERVICES PROVIDED AND NUMBER OF INDIVIDUALS RECEIVING SERVICES (Subpart IIG)**

**I**     Community Services - A yes or no response is required. Centers are encouraged but not required to report the number of hours of community service provided. The intent is to obtain a count of the types and hours of all services being provided. Please round to the nearest whole hour.

(A)     Information and Referral -- this is a service that does not entail the creation of a CSR and may include such things as group presentations or telephone referrals.

(B)     Community and Systems Advocacy -- this includes efforts to implement local policy and legislation changes to make facilities, services, and opportunities available and accessible to individuals with disabilities.

(C)     Outreach Efforts -- this entails the location of and provision of services to individuals with significant disabilities in the community.

(D)     Publications -- these may include accessibility guides, disability awareness brochures, ADA information, etc..

(E)     Community Education -- activities and information programs to enhance the community's awareness of disabilities and disability issues, e.g. local TV, radio, or newspaper campaigns.

(F)     Maintaining Registries -- includes activities related to creating and maintaining directories for personal assistants, recreation opportunities, accessible transportation, accessible housing, and other support services.

(G)     Other -- activities that do not fit in any of the above.

**II**     Individual Services - The number of consumers receiving each of the following services offered during the reporting year. This number is not expected to equal the number of

consumers served, as a single individual may receive a number of different services during the reporting year. Individual IL services include, but are not limited to the following areas:

- (A) Advocacy/Legal Services -- assistance and/or representation in obtaining access to those benefits, services and programs to which a consumer may be entitled.
- (B) Assistive Devices/Equipment -- provision of specialized devices and equipment such as TDDs, wheelchairs and lifts, or the provision of assistance to obtain these devices and equipment from other sources.
- (C) Children's Services -- the provision of IL services to individuals with significant disabilities under the age of six.
- (D) Communication Services -- services directed to enable consumers to better communicate such as: interpreter services; training in communication equipment use; Braille instruction; and reading services.
- (E) Counseling Services -- these include psychological, psychotherapeutic, and related services.
- (F) Family Services -- these are provided to the family members of an individual with significant disabilities when necessary for improving the individual's ability to live and function more independently, or their ability to engage or continue in employment. Such services may include respite care. CILs should record the service in the consumer's CSR on behalf of whom services were provided to the family.
- (G) Housing or Shelter Services -- these are related to securing housing or shelter, adaptive housing services (including appropriate accommodations to and modifications of any space used to serve, or occupied by individuals with significant disabilities). A CIL shall not provide housing or shelter as an IL service on either a temporary or long term basis unless the housing or shelter is incidental to the overall operation of the CIL and is provided to any one individual for a period not to exceed eight weeks during any six-month period.
- (H) IL Skills Training and Life Skills Services and Training --these may include instruction to develop independent living skills in areas such as personal care, coping, financial management, social skills, and household management. This may also include education and training necessary for living in the community and participating in community activities.
- (I) Information and Referral Services -- individual services provided to a consumer. Some CILs record this service using strokes on an answering pad, others create a CSR or other such files for future contact and outreach.

- (J) Mental Restoration -- psychiatric restoration services including maintenance on psychotropic medication, psychological services, and treatment management for substance abuse.
- (K) Mobility Training -- a variety of services involving assisting consumers to get around their homes and communities.
- (L) Peer Counseling -- counseling, teaching, information sharing, and similar kinds of contact provided to consumers by peers (other people with disabilities).
- (M) Personal Assistance Services -- these include attendant care and the training of such personnel providing these services.
- (N) Physical Restoration -- restoration services including medical services; therapeutic treatments, such as physical therapy, occupational therapy, speech, language, and hearing therapy; health maintenance; eyeglasses and visual services; and prosthetic, orthotic and other assistive appliances and devices.
- (O) Preventative Services -- these are intended to prevent additional disabilities, or to prevent an increase in the severity of an existing disability.
- (P) Prosthesis and other Appliances (See Rehab technology)
- (Q) Recreational Services -- provision or identification of opportunities for the involvement of consumers in meaningful leisure time activities. These may include such things as participation in community affairs and other recreation activities that may be competitive, active or quiet.
- (R) Rehabilitation Technology -- provision of, or assistance to obtain through other sources, adaptive modifications which address the barriers confronted by individuals with significant disabilities with respect to education, rehabilitation, employment, transportation, IL and/or recreation.
- (S) Therapeutic Treatment -- services provided by registered occupational, physical, recreational, or speech therapists.
- (T) Transportation -- provision of or arrangements for transportation.
- (U) Youth Services -- these are provided to youth with significant disabilities, ages 6-17, and may include training to develop skills specifically designed for youths to promote self-awareness and esteem, develop advocacy and personal power skills, and the exploration of career options.
- (V) Vocational Services -- any of the services defined in Section 103 of the Act.
- (W) Other -- any IL service not listed above.

## **RSA REGIONAL OFFICE DIRECTORY**

### **REGION I**

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### **REGION VIII**

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### **REGION IX**

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\*AZ, HI, NV, GU, AS, CA, CNMI

### **REGION X**

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\*AK, ID, OR, WA

### **CENTRAL OFFICE DIRECTORY**

IL Team Leader: Mr. John Nelson  
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CIL Program Officer: Ms. Merri Pearson  
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**UNITED STATES DEPARTMENT OF EDUCATION  
OFFICE OF SPECIAL EDUCATION AND REHABILITATIVE SERVICES  
REHABILITATION SERVICES ADMINISTRATION**

Washington, DC 20202-2741

**ANNUAL PERFORMANCE REPORT**

**CENTERS FOR INDEPENDENT LIVING PROGRAMS**

**FISCAL YEAR 1998  
Non-Cited Version**

**CENTER:** \_\_\_\_\_ **STATE:** \_\_\_\_\_

**COUNTIES SERVED:** \_\_\_\_\_

**NAME OF GRANTEE:** \_\_\_\_\_

**GRANT NUMBER:** \_\_\_\_\_

November, 30, 1998                      THE REHABILITATION ACT OF 1973, AS AMENDED (ACT)

\*INSERT STANDARD FORM 524 (FACE SHEET OF GRANTS)

\*INSERT INSTRUCTIONS FOR FILLING OUT FORM 524

**SUBPART II A - APPLICANT SELF EVALUATION****I - COMPLIANCE INDICATOR 1 PHILOSOPHY****(A) Consumer Control**

- (1) Over 50 percent of the CIL's --  
 . Governing board is composed of individuals with significant disabilities

Y N

<b>b. CIL Employees</b>	<b>Total Positions</b>	<b>Number of persons with disabilities</b>	<b>Number of persons who are minorities</b>
Decision making Positions			
Staff Positions			

**(B) Self-help and Self-advocacy**

- (1) During the reporting year the CIL has conducted activities that promote self-help and self-advocacy among individuals with significant disabilities.

Y N

**(C) Development of Peer Relationships and Peer Role Models**

- (1) During the reporting year the CIL has conducted activities that promote the development of peer relationships and peer role models among individuals with significant disabilities as instructors and counselors in its programs.

Y N

**(D) Equal Access**

- (1) Ensures equal access to the CIL's services, programs, activities, resources, and facilities, whether publicly or privately funded. Equal access means that the same access is provided to the individual with a disability regardless of the individual's type of disability.

Y N

- (2) Advocates for and conducts activities that promote the equal access to all services, programs, activities, resources, and facilities in society, whether public or private, and regardless of funding sources for individuals with

significant disabilities. Equal access means that the same access is provided to the individual with a disability regardless of the individual's type of disability.

Y N

- (3) Makes available, as appropriate, all written policies, materials, and IL services in alternative formats.

Y N

## **II - COMPLIANCE INDICATOR 2 - PROVISION OF SERVICES ON A CROSS-DISABILITY BASIS**

The Center provides the following:

- (A) IL services to eligible individuals or groups of individuals without restrictions based on the particular types of disabilities that the individuals or groups of individuals may have.

Y N

- (B) IL services to individuals with a diversity of significant disabilities, and individuals who are members of populations that are unserved or underserved by programs under Title VII of the Act.

Y N

- (C) IL core services to individuals with significant disabilities in a manner that is neither targeted nor limited to a particular type of disability.

Y N

## **III - COMPLIANCE INDICATOR 3 - INDEPENDENT LIVING GOALS**

- (A) The CIL maintains a CSR for each consumer that contains:

- (1) documentation concerning eligibility or ineligibility of services; Y N
- (2) either an ILP or a waiver of the ILP; and Y N
- (3) the IL goals or objectives established with the consumer. Y N

- (B) The CIL maintains documentation that includes evidence of:

- (1) that the CIL notifies all consumers of their right to develop or waive the development of the ILP; Y N
- (2) the number of ILPs developed by consumers receiving services from the CIL;

- |     |  |   |   |
|-----|--|---|---|
|     |  | Y | N |
| (3) | the CIL facilitates the development and achievement of IL goals selected by individuals with significant disabilities who request assistance from the CIL;   | Y | N |
| (4) | that the CIL provides opportunities for consumers to express satisfaction with the CIL's services and policies in facilitating their achievement of IL goals and provides any results to its governing board and SILC; and | Y | N |
| (5) | the number of waivers signed by consumers receiving services from the CIL stating that an ILP is unnecessary.  | Y | N |

**IV - COMPLIANCE INDICATOR 4 - COMMUNITY OPTIONS AND COMMUNITY CAPACITY**

During the reporting year, the CIL promoted the increased availability and improved quality of community-based programs that serve individuals with significant disabilities and promoted the removal of any existing architectural, attitudinal, communication, environmental, or other type of barrier that prevents the full integration of these individuals into society. The CIL advocated and performed at least one activity in each of the following categories:

- |     |  |   |   |
|-----|--|---|---|
| (A) | Community advocacy;  | Y | N |
| (B) | Technical assistance to the community on making services, programs, activities, resources, and facilities in society accessible to individuals with significant disabilities;  | Y | N |
| (C) | Public information and education;  | Y | N |
| (D) | Aggressive outreach to consumers who are members of populations of individuals with significant disabilities that are unserved or underserved by programs under Title VII of the Act in the CIL's service area; and  | Y | N |
| (E) | Collaboration with service providers, other agencies and organizations that could assist in improving the options available for individuals with significant disabilities to participate in the services, programs, activities, resources, and facilities in the service area. | Y | N |

**V - COMPLIANCE INDICATOR 5 - IL CORE SERVICES AND OTHER IL SERVICES**

- |     |   |  |  |
|-----|---|--|--|
| (A) | The CIL provides information and referral to all individuals who request these types of assistance or services from the center; and |  |  |
|-----|---|--|--|

Y N

- (B) As appropriate in response to their requests, provides to individuals with significant disabilities who are eligible for IL services from the CIL the following services: IL skills training; Peer counseling (including cross-disability peer counseling; individual and systems advocacy; and, a combination, as appropriate, of any two or more other IL services.

Y N

**VI - COMPLIANCE INDICATOR 6 - RESOURCE DEVELOPMENT ACTIVITIES**

- (A) The CIL conducted resource development activities during the reporting year to obtain funding from sources other than Chapter 1 of Title VII of the Act.

Y N

**SUBPART IIB: NARRATIVE - COMPARISON OF THE ACTIVITIES OF THE CIL WITH THE REPORTING YEAR WORK PLAN AND WITH THE PLANNED ACTIVITIES AND THE ACTIVITIES IN THE YEAR IMMEDIATELY PRECEDING THE REPORTING YEAR**

This section compares the accomplishments of fiscal year 1998 with the work plan for fiscal year 1998. Fiscal year 1999 (the current year) is not addressed in this report. *Fiscal year 2000 work plans are to be included in Subpart C.*

**ATTACHMENT II - B**

In the following order please provide:

- (A) A comparison of fiscal year 1998 activities and accomplishments with the plan goals and activities. Where appropriate, provide a brief comparison of program accomplishments and goal achievements during fiscal year 1998 to fiscal year 1997.
- (B) If appropriate, descriptions of significant activities not accounted for elsewhere in this report.
- (C) As appropriate, descriptions of substantial problems or difficulties, alternative solutions explored, and what worked and why.

**SUBPART IIC:      PROGRAM PLANNING OBJECTIVES**

**ATTACHMENT II - C(a)**

This is a copy of Federal fiscal year 2000's work plan.

**ATTACHMENT II - C(b)**

This is a list of training and technical assistance needs listed in priority area for the CIL.

**SUBPART IID:        SOURCES AND AMOUNTS OF RESOURCES FOR THE  
                             OPERATION OF THE CIL DURING THE REPORTING YEAR**

**I        -        RESOURCES**

**(A)    Federal Funds**

.        Ch. 1, part B, Title VII	_____
.        Ch. 1, part C, Title VII	_____
.        Ch. 2, Title VII	_____
.        Other Federal Funds	_____

**(B)    Other Government Funds**

.        State Government Funds	_____
.        Local Government Funds	_____

**(C)    Private Funds**

.        Foundations, Corporations, or Trust Grants	_____
.        Donations from Individuals	_____
.        Memberships	_____
.        Investment Income, Endowments	_____
.        Fee for Service (program income)	_____
.        Other Resources (in-kind, etc.)	_____

**(D)    TOTAL RESOURCES**

\_\_\_\_\_

**(E)    Amount of Total Resources that “pass through” to  
consumers, e.g. personal assistance service funds**

\_\_\_\_\_

**(F)    Net Resources (line ‘d’ minus line ‘e’)**

\_\_\_\_\_

## **SUBPART IIE:        NEXT YEAR BUDGET INFORMATION**

If a CIL has negotiated a budget for each year of its grant award, and there are no changes needing RSA approval, the completion of this section is not required. This section is Education Form 524, and found on the following page.

## **SUBPART IIF:        NUMBERS AND TYPES OF INDIVIDUALS WITH SIGNIFICANT DISABILITIES RECEIVING SERVICES THROUGH THE CIL**

I -	Consumers served during the reporting year:		
	(A)    CSRs carried from previous year		_____
	(B)    CSRs started since Oct. 1 of the reporting year		_____
	(C)    Total consumers served		_____
II -	Consumers inactive on September 30 <sup>th</sup> of the reporting year		
	(A)    Moved		_____
	(B)    Withdrew		_____
	(C)    Died		_____
	(D)    Inactive because goals were met		_____
	(E)    Other		_____
	(F)    Total		_____
III -	Consumers (CSRs) active on September 30 <sup>th</sup> of the reporting year [line 'I-c' minus line 'I-f']		_____
IV -	Consumer Plans and Waivers		
	(A)    Number of individuals declining offer to develop ILP		_____
	(B)    Number of individuals with whom an ILP was developed		_____
V -	Consumer Achievements		
		<b>Goals Set</b>	<b>Goals Met</b>
	(A)    Self-care	_____	_____
	(B)    Communication	_____	_____
	(C)    Mobility	_____	_____
	(D)    Residential	_____	_____
	(E)    Educational	_____	_____
	(F)    Vocational	_____	_____
	(G)    Other	_____	_____



VI -	Age Information	<b>Numbers of Individuals</b>
(A)	Under 6	_____
(B)	6 - 17	_____
(C)	18 - 22	_____
(D)	23 - 54	_____
(E)	55 & Over	_____
VII -	Gender	
(A)	Female	_____
(B)	Male	_____
VIII -	Race/ethnicity	
(A)	White (non-Hispanic)	_____
(B)	Black (non-Hispanic)	_____
(C)	American Indian or Alaskan Native (including Native Hawaiian)	_____
(D)	Asian or Pacific Islander	_____
(E)	Hispanic	_____
IX -	Disability	
(A)	Cognitive	_____
(B)	Mental/Emotional	_____
(C)	Physical	_____
(E)	Hearing	_____
(F)	Vision	_____
(G)	Multiple Disability	_____
X -	Community-Based Living	
(A)	Individuals successfully relocated from nursing homes or other institutions to community-based living arrangements	_____
(B)	Individuals for whom IL services prevented the necessity of entering nursing homes or other institutions and therefore continued living in a community-based living arrangements	_____

**SUBPART IIG:      TYPES OF SERVICES PROVIDED AND THE NUMBER OF  
INDIVIDUALS WITH SIGNIFICANT DISABILITIES RECEIVING  
EACH TYPE OF SERVICE**

I -	Community Services ( <i>this section is optional</i> )	<b>Total Hrs</b>
(A)	Information and Referral	_____
I -	Community Services ( <i>this section is optional</i> )(continued)	<b>Total Hrs</b>
(B)	Community and Systems Advocacy	_____
(C)	Outreach	_____
(D)	Publications	_____
(E)	Community Education	_____

(F)	Maintaining Registries	_____
(G)	Other	_____
(H)	Total	_____

II -	Individual Services	Numbers of Individuals
(A)	Advocacy	_____
(B)	Legal	_____
(C)	Children's	_____
(D)	Communication	_____
(E)	Counseling and Related	_____
(F)	Family	_____
(G)	Housing, Home Modifications, and Shelter	_____
(H)	Information and Referral	_____
(I)	IL Skills Training and Life Skills Training	_____
(J)	Mental Restoration	_____
(K)	Mobility Training	_____
(L)	Peer Counseling (incl: Cross-disability Peer Counseling)	_____
(M)	Personal Assistance Services	_____
(N)	Physical Rehabilitation	_____
(O)	Preventative Services	_____
(P)	Prostheses and other	_____
(Q)	Recreational	_____
(R)	Rehabilitation Technology	_____
(S)	Therapeutic Treatment	_____
(T)	Transportation	_____
(U)	Youth	_____
(V)	Vocational	_____
(W)	Other	_____

**I hereby affirm that the information contained in this Section 704 Annual Performance Report, Part II is true and correct to the best of my knowledge:**

SIGNATURE OF THE CENTER FOR INDEPENDENT LIVING DIRECTOR	DATE
---	------

SIGNATURE OF THE GRANT OFFICIAL (IF DIFFERENT FROM THE DIRECTOR)	DATE
--	------

NAME AND TITLE OF GRANT OFFICIAL	PHONE NUMBER
----------------------------------	-----------------